

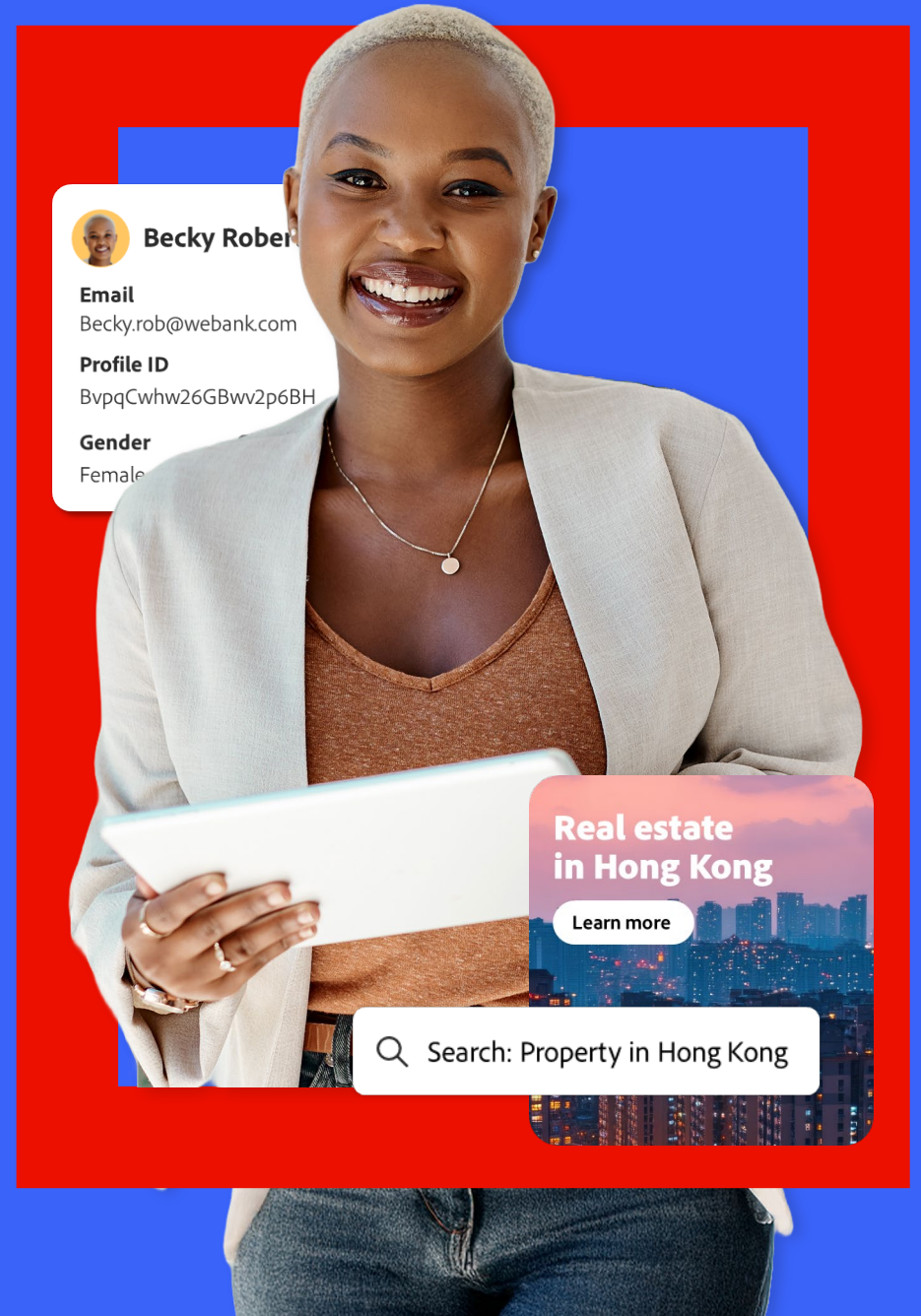
# How to amplify the Value of your MarTech Infrastructure and Data with a CDP

Hosted by Adobe and featuring Forrester

**Alyssa Espiritu,**  
Senior Product Marketing Manager, Adobe

**Joe Stanhope,**  
VP, Principle Analyst and Guest Speaker, Forrester

**Adobe**



# Our speakers



**Alyssa Espiritu**

Senior Product Marketing Manager

**Adobe**

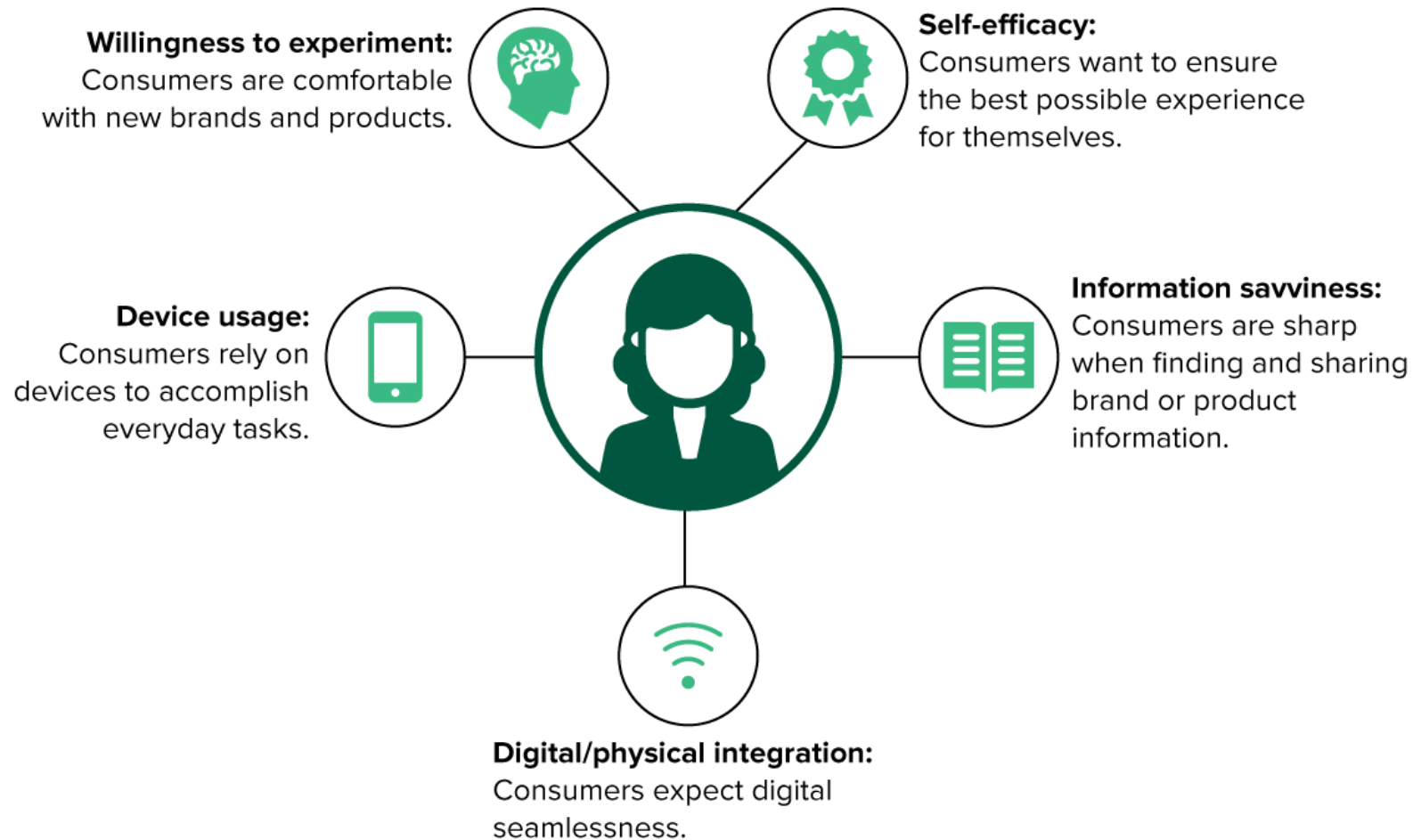


**Joe Stanhope**

VP, Principal Analyst and Guest Speaker

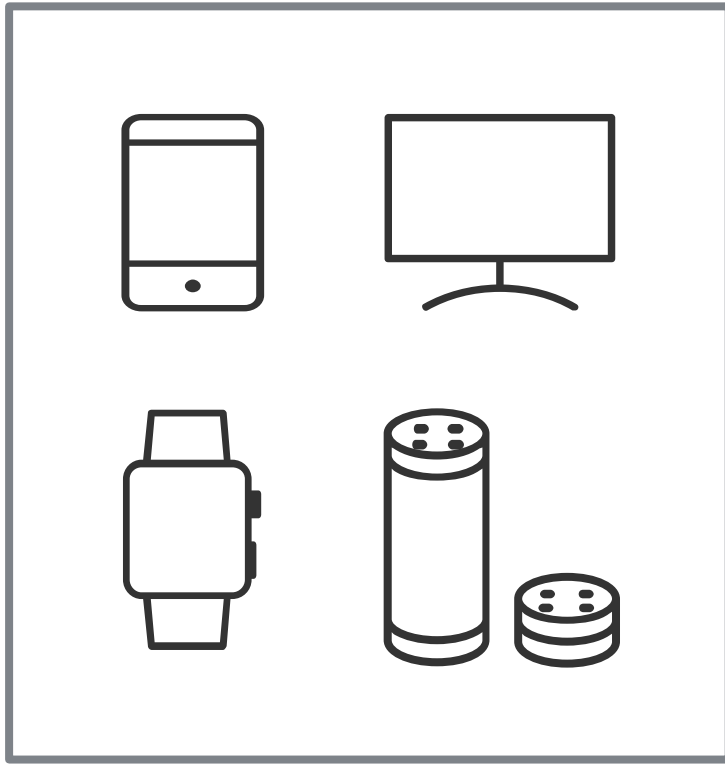
**FORRESTER®**

# Consumers are empowered and connected

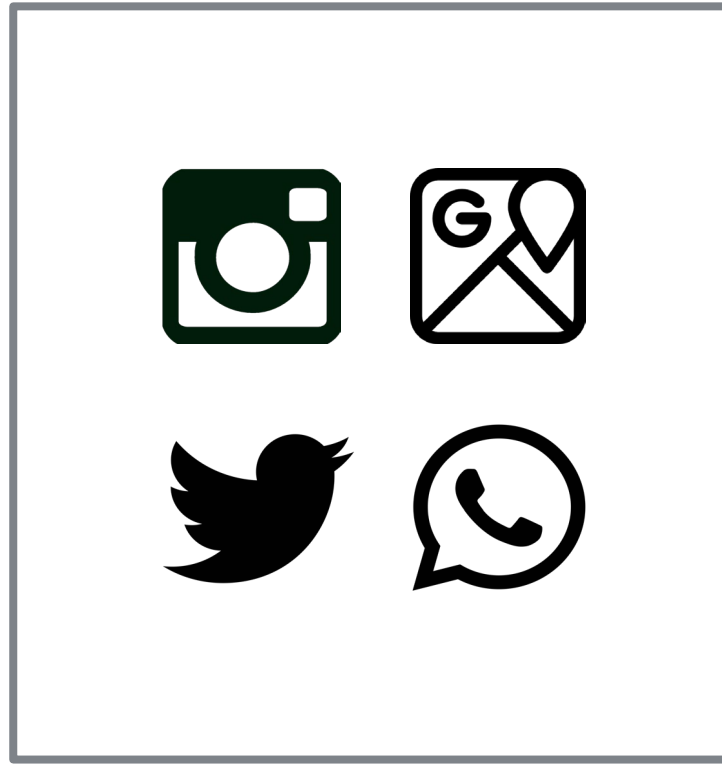


# Consumers choose a combination of devices, platforms, and channels

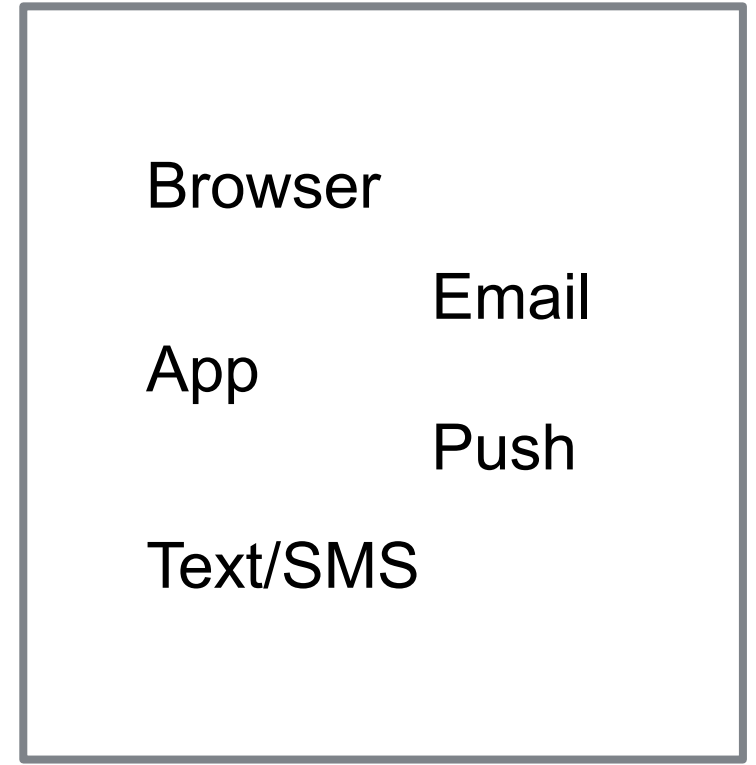
## 4.6 Devices



## 4.4 Platforms















## 5.4 Channels





# The engagement permutations are almost infinite

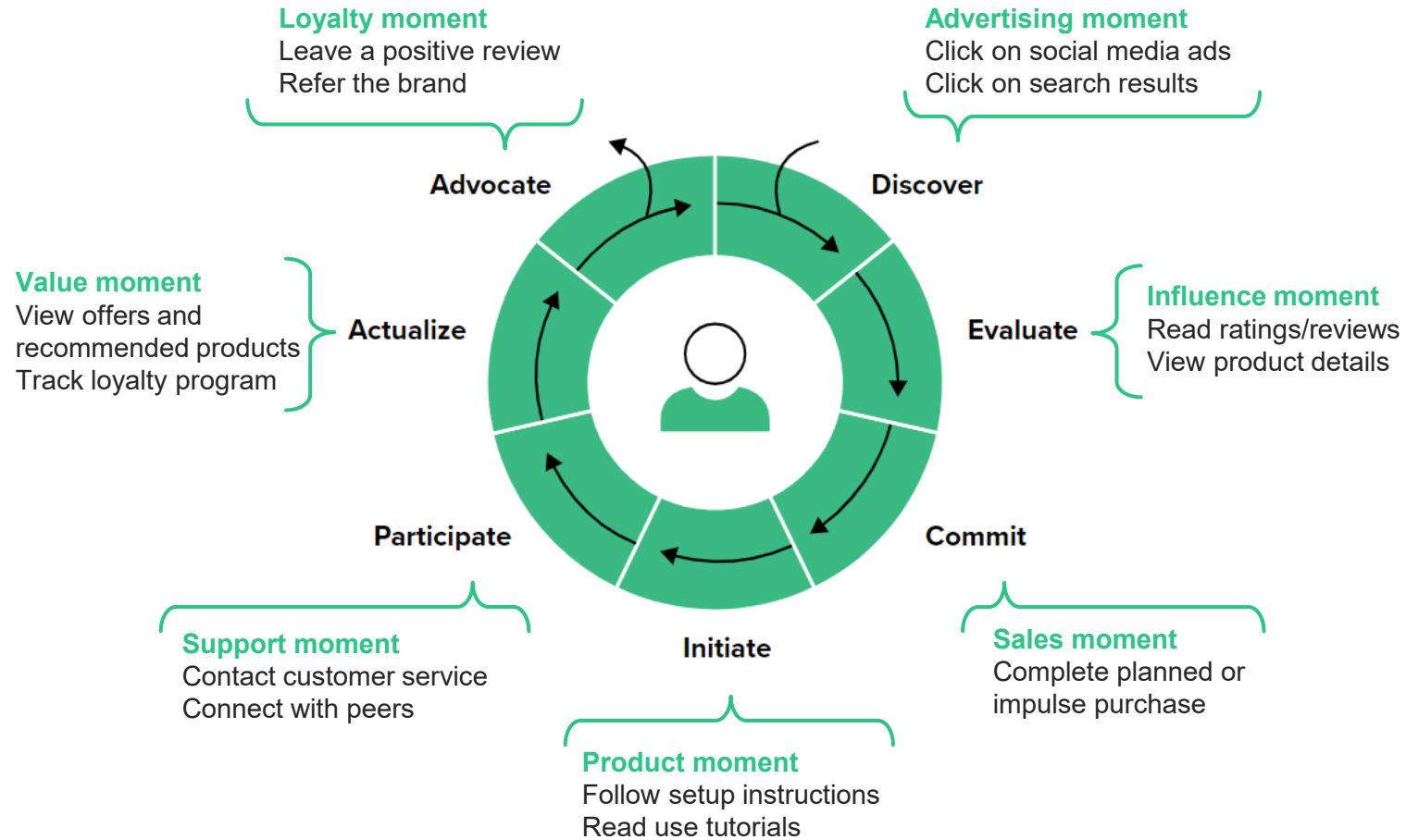
Device	Computer		Smartphone		Smartwatch		Tablet		VR headset		Connected TV		<div></div> <div></div> <div></div>
Platform													<div></div> <div></div> <div></div>
Channel	SMS		Push		App		Browser		Virtual assistant		Email		PWA <div></div> <div></div> <div></div>
Interaction mode	GUI		Chat				Voice				XR		
What	Content		Content		Content		Service		Service		Service		

# Companies must win in customers' moments.

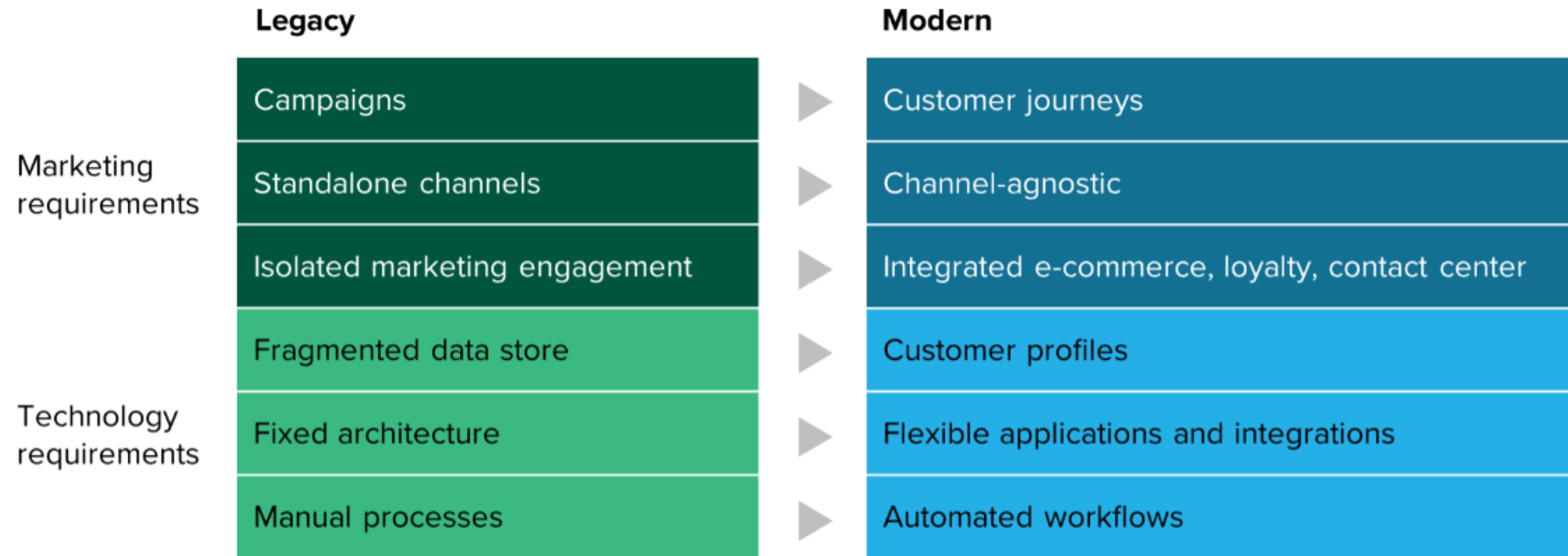
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A moment is a point in time and space when a person interacts with a brand to get what they want **immediately** and **in context**.

# Moments span the customer lifecycle.

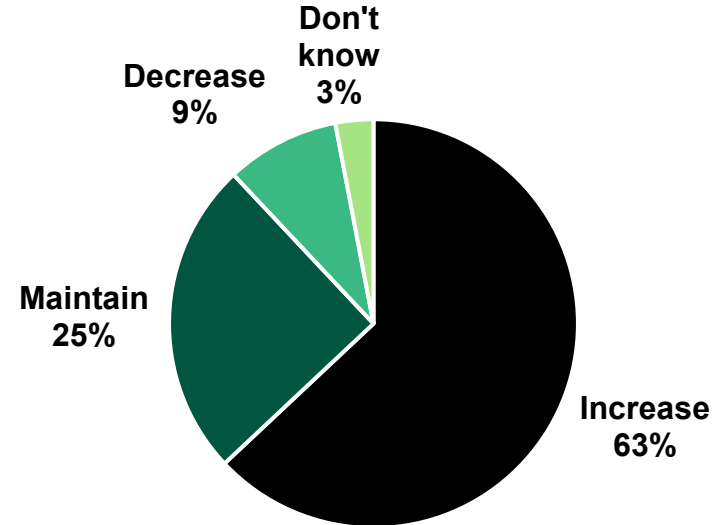


# Moments signal a strategic shift



# Martech is resilient and in-demand

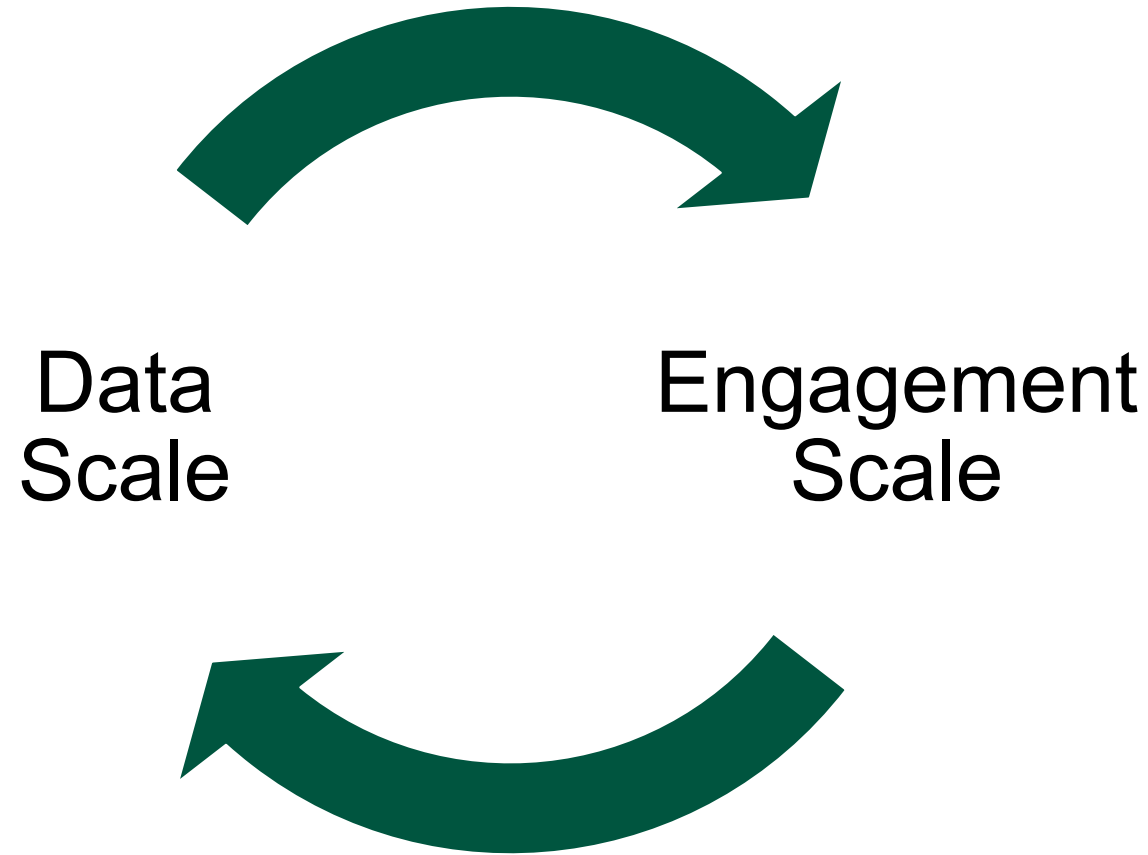
“How will your company’s spending on marketing technology change in the next 12 months?”



**82%** of executives support investments in marketing technology

**Data** is the foundation.

# Moments drive a perpetual motion machine for data





# Data deprecation shatters business-as-usual

## Consumer actions

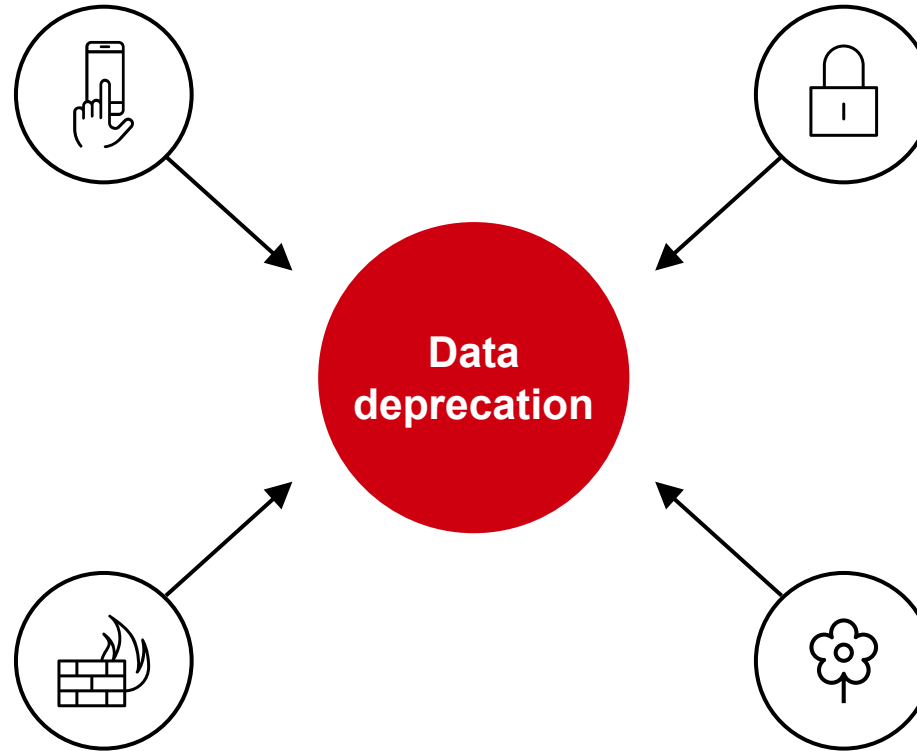
Consumers continue to opt out of third-party tracking and data storing.

- Ad blockers
- Clearing browsing history
- Adjusting device settings to limit data sharing (location, Bluetooth, etc.)

## Browser and operating system restrictions

Third-party cookie restrictions, changes to device signal access, and privacy-first browsers impact identity-based marketing strategies.

- Apple ITP, ATT, Private Relay
- Firefox ETP
- Google Privacy Sandbox



## Privacy regulations

Regulations impact the advertisers' ability to track and store data.

- Europe: GDPR, ePrivacy
- US: CPRA, CPA, CDPA, VCDPA, UCPA
- Global: LGPD, PIPEDA, and many more

## Walled gardens

These closed ecosystems restrict data extraction and tracking, which impacts insights access and marketing planning capabilities.

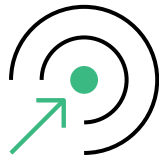
- Facebook
- Google
- Retail media networks (e.g., Amazon, Kroger, Walmart)

# Data challenges are pervasive



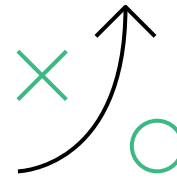
**18%**

It takes too long to  
deliver value to the  
business



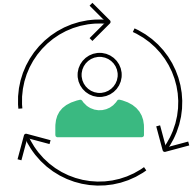
**22%**

Lack of foundational  
data management



**26%**

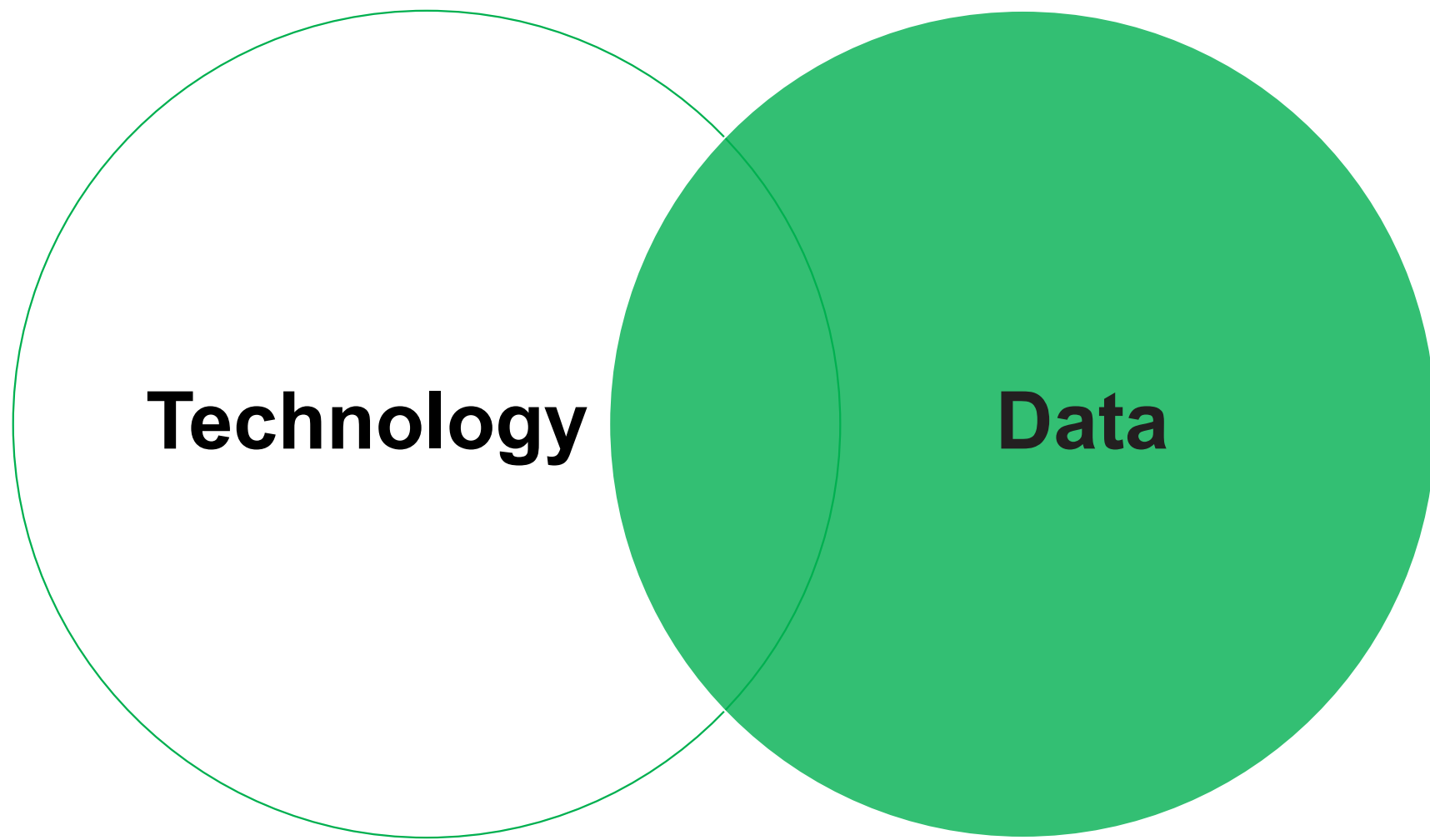
Poor data quality



**31%**

Data silos

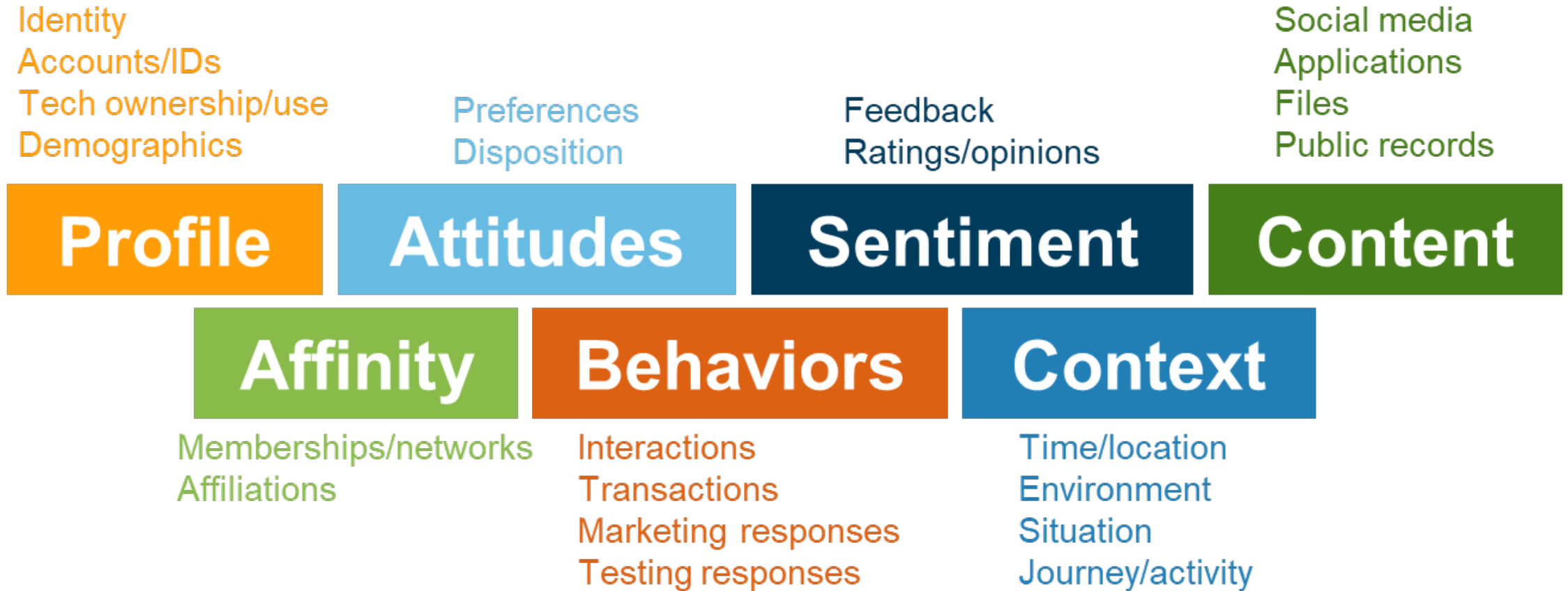
The CDP sits at the **nexus** of these trends.



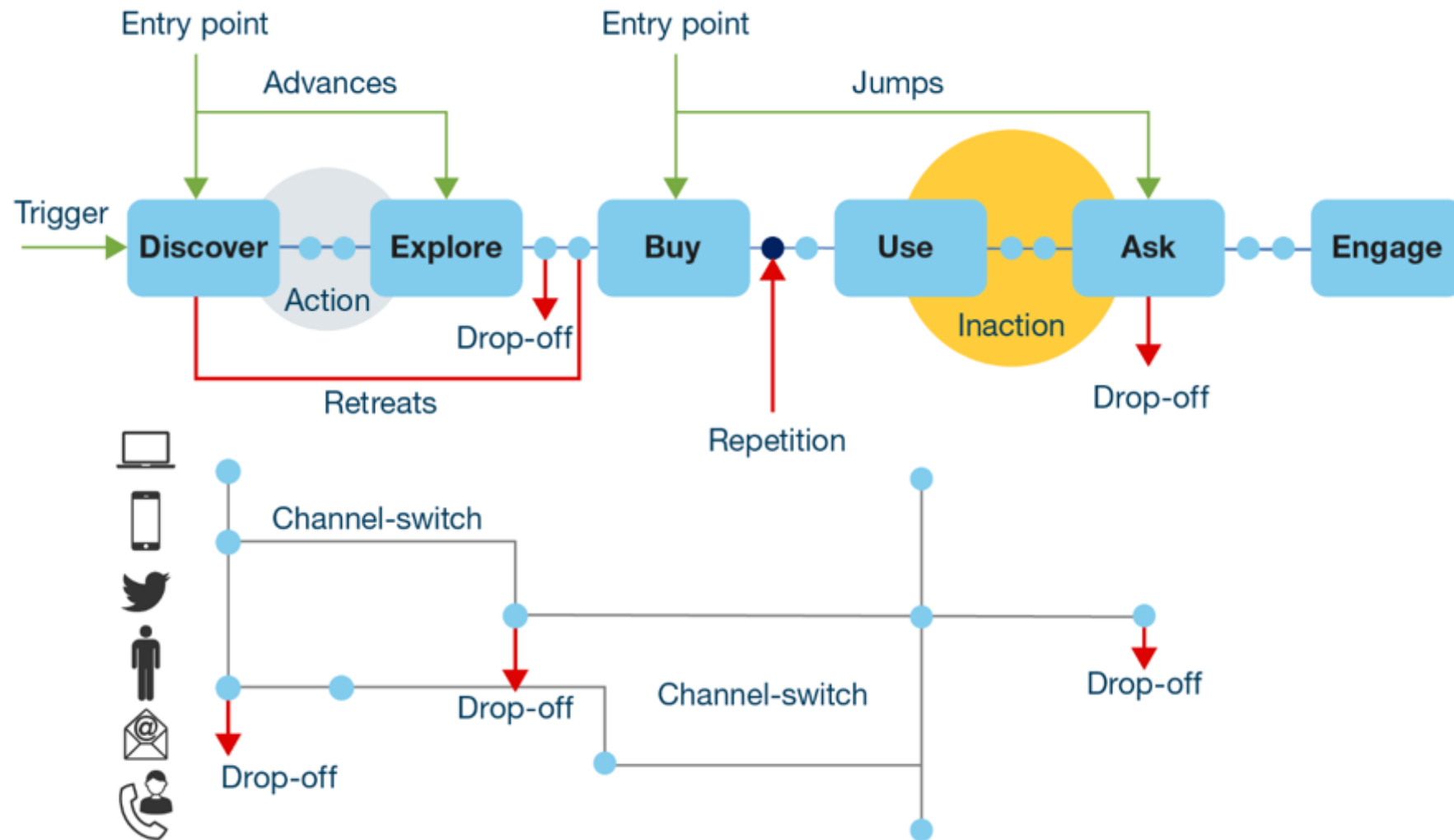
**Technology**

**Data**

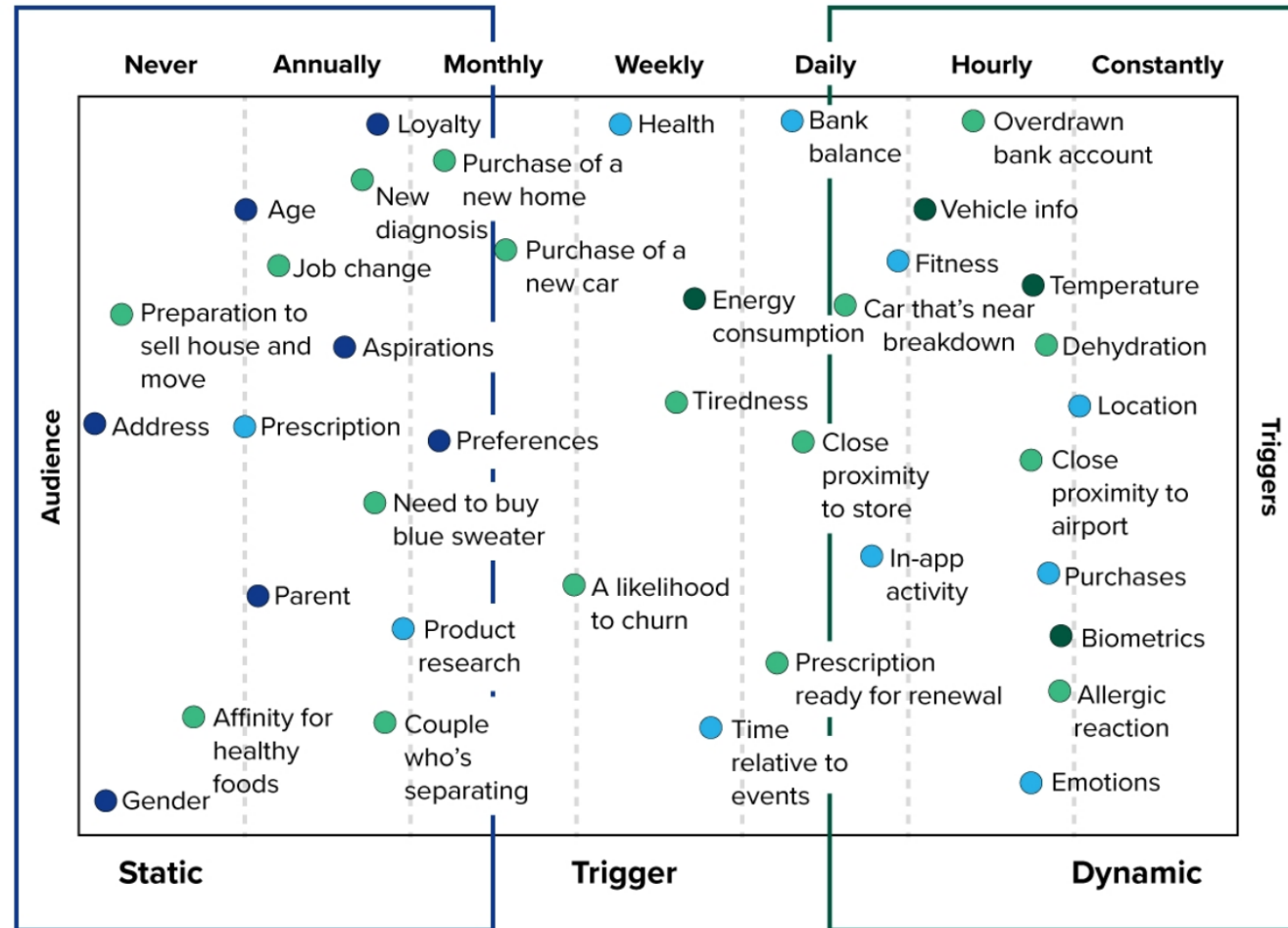
# Assembling robust customer profiles



# Generating a view of customer journeys



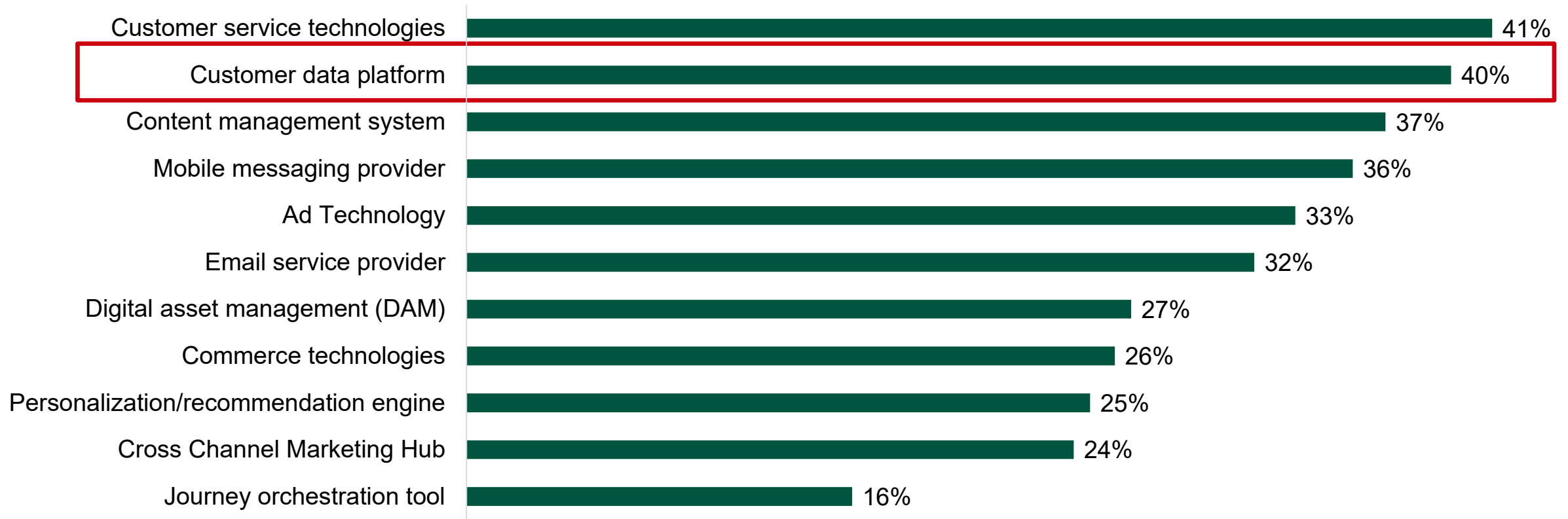
# Expanding the palette of data and its applications



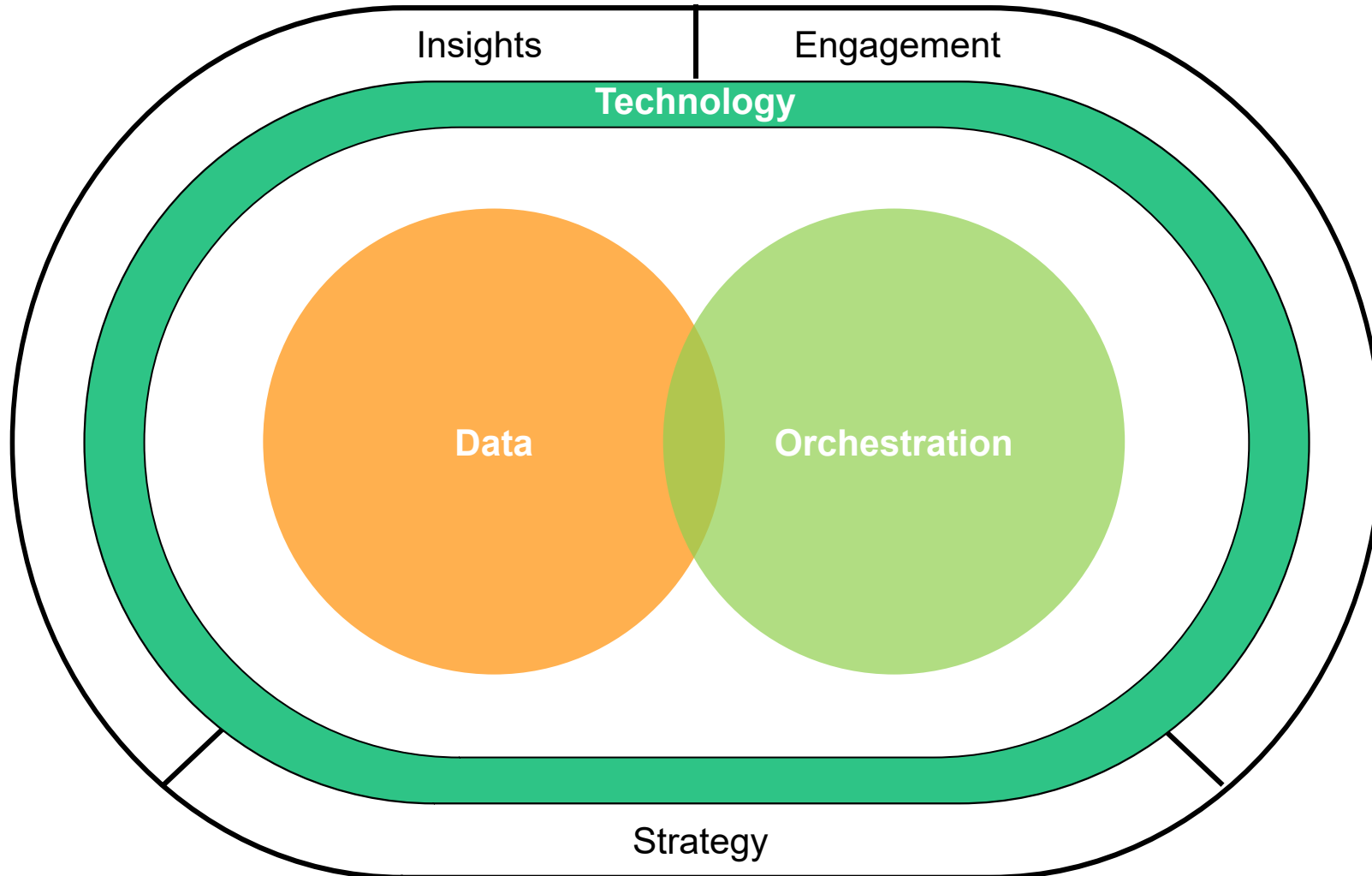


# CDP expectations are on the rise

Which of the following technologies does your organization use to help build and deliver your digital experiences?



# A counterintuitive martech strategy: Controlled asymmetry based on a CDP core

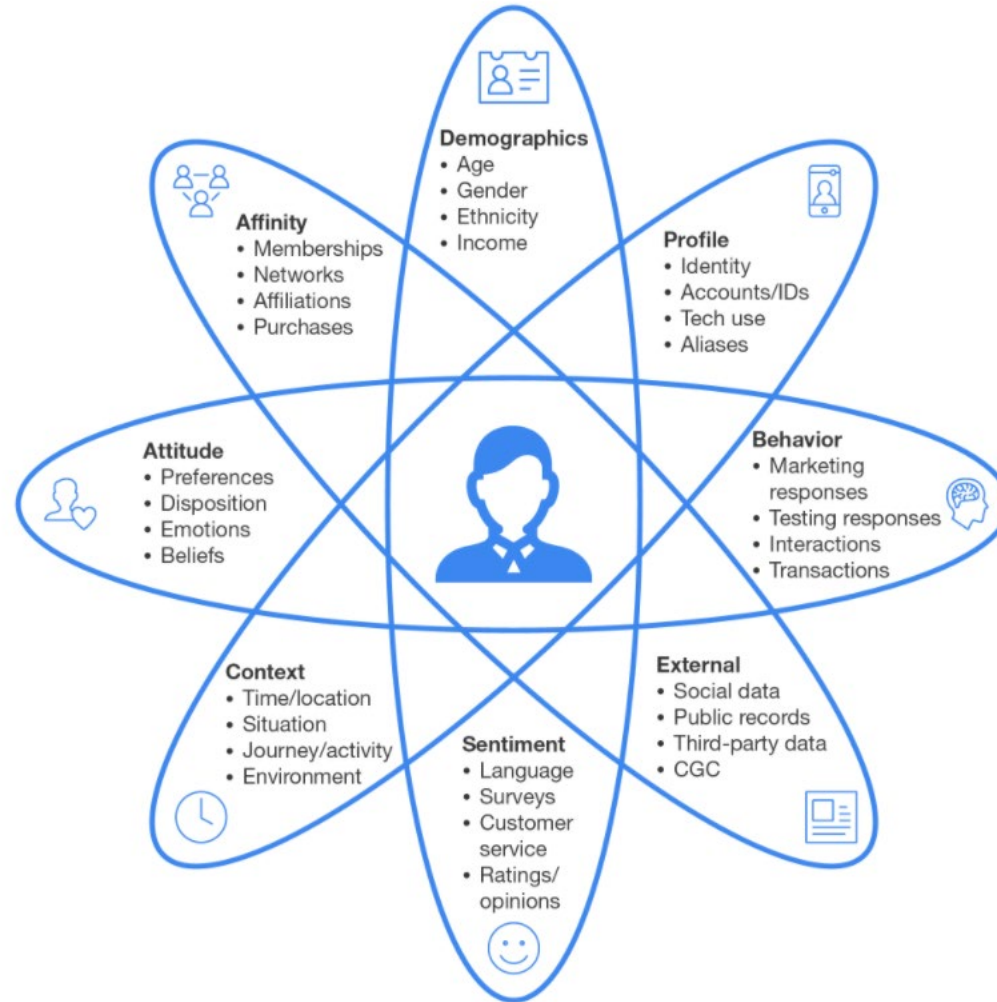




**What does the customer profile need to look like?**

# Curating the consumer profile

360-degree view of the customer



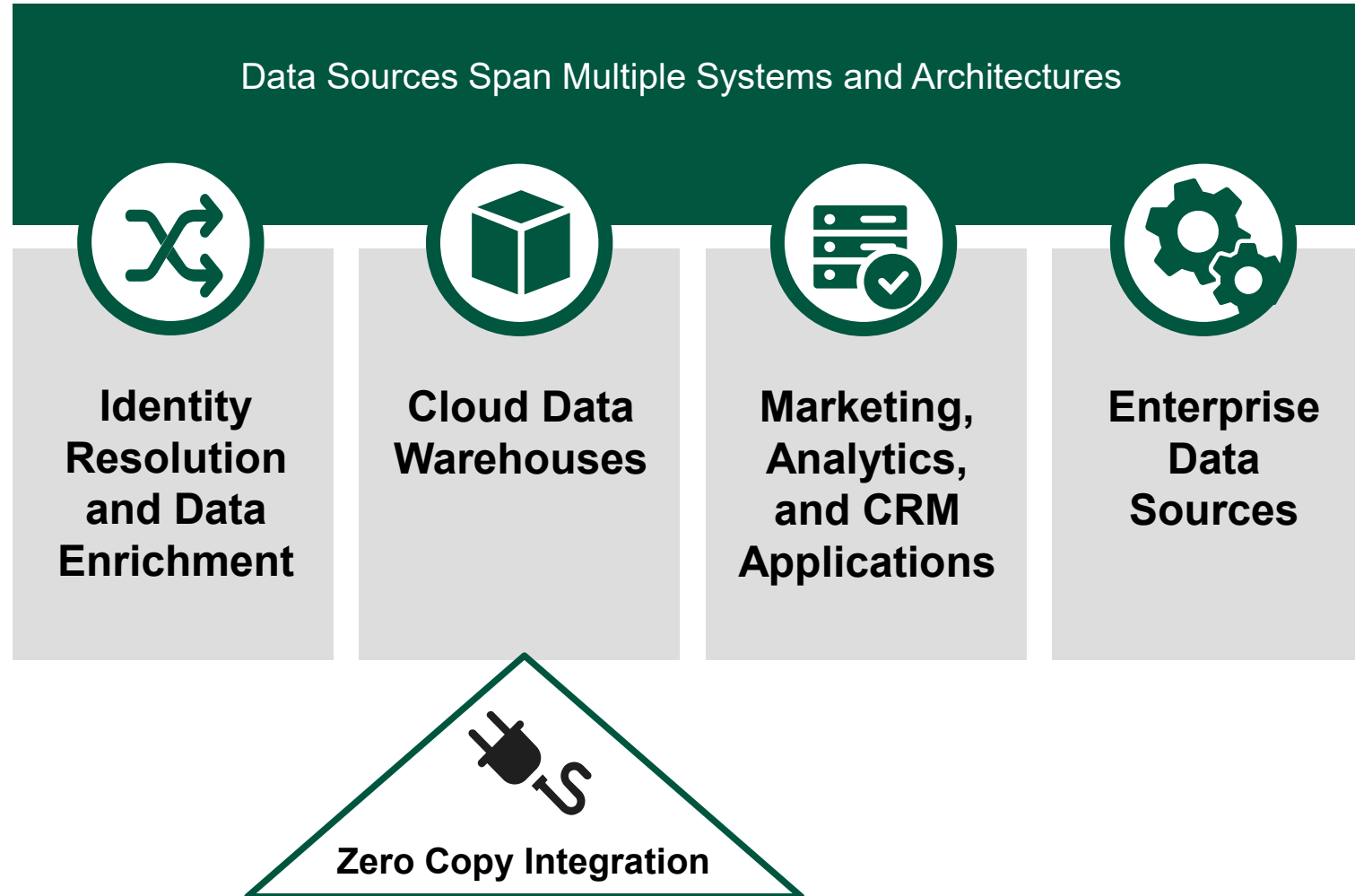




**Are we prepared for a full range of data sources?**



# Supporting diverse and performant data sources

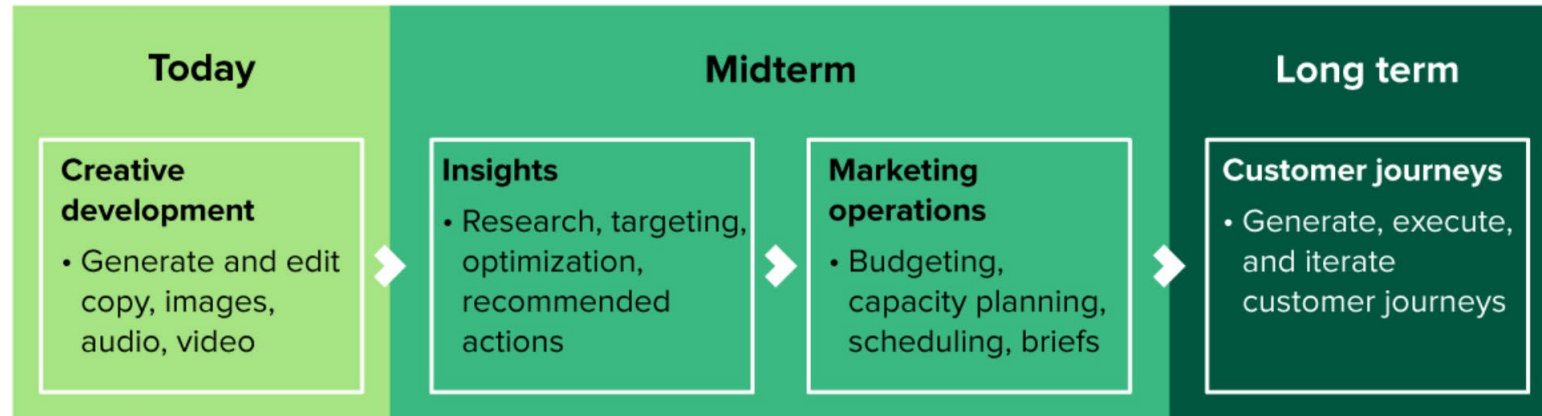


**Are we setting the stage for AI  
superpowers?**



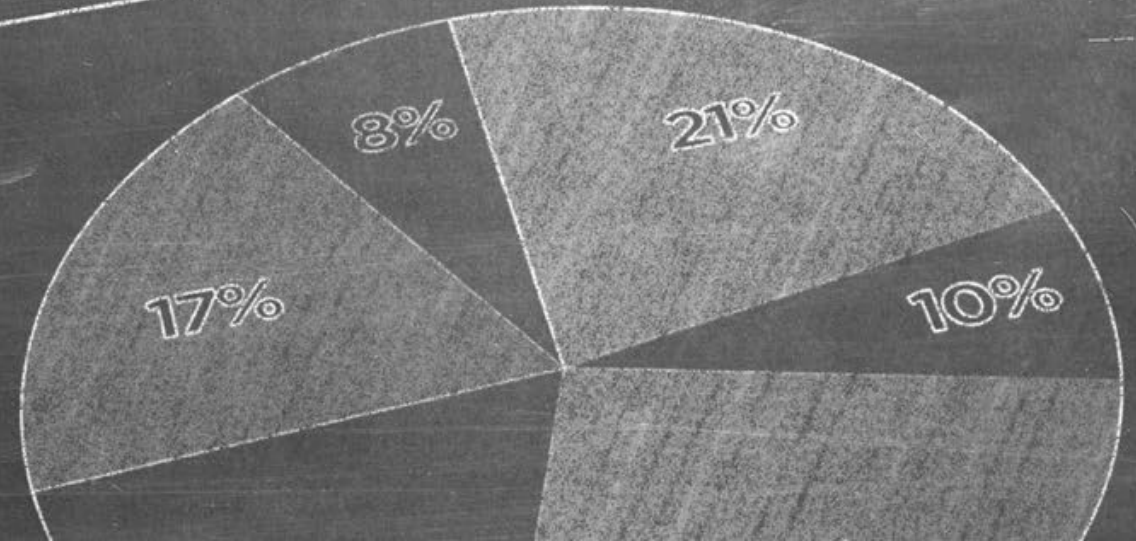


# Preparing to support long term GenAI iteration

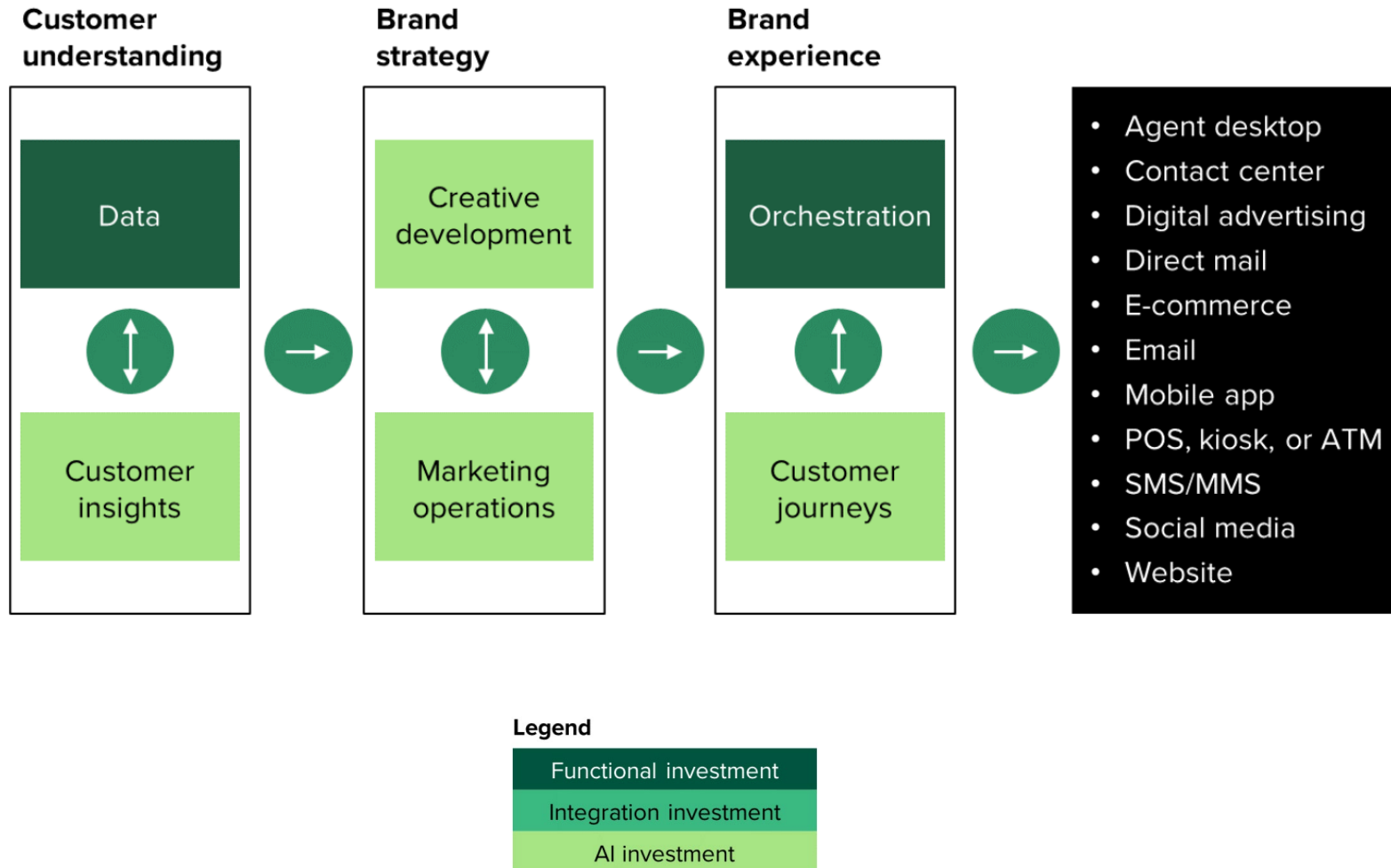




**Does the CDP facilitate the martech ecosystem?**



# Connectivity for the ecosystem



# Today's Customer Data Platform is an investment in the future.

---

- The evolution of customer engagement shifts martech priorities towards data as the differentiator
- Plan for agility – Leverage the CDP as a future-proofed data and orchestration core
- Raise your expectations for a CDP's performance, integration, and data access capabilities

# Adobe Real-Time CDP Vision





# Adobe Real-Time CDP Core Pillars

Collect, normalize, and govern B2B and B2C data into real-time profiles for activation across any channel



Fast, flexible  
data connections



Actionable  
real-time profiles



Productized governance,  
security, privacy



Activation  
anywhere

**With artificial intelligence at every step**

Profiles by source



■ High prop  
■ Medium prop  
■ Low propensit

☒ Location service

 Send to: [asmith@altura.com](mailto:asmith@altura.com)

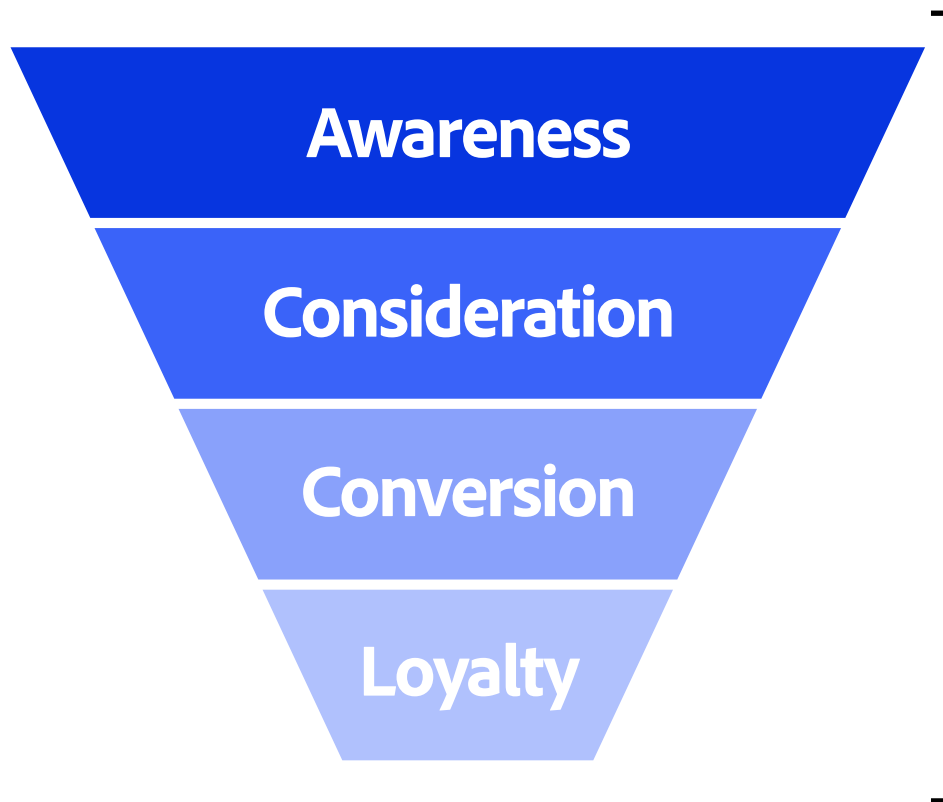
A journey in  
every bite.





I need to continue growing my business by **finding, acquiring, and nurturing loyal customers** without fully relying on third-party cookies.

# Full funnel marketing with Adobe Real-Time CDP



Adobe Real-Time CDP can support you throughout your customer data management journey



# Adobe Real-Time CDP | Collect, manage, govern & activate

## Data collection

### First-party known customer data

CRM      Authenticated profile  
Email      Etc.  
Data lake

### First-party unknown customer data

Behavioral events      Device ID  
First-party cookies      Pseudonymous IDs

### Partner data

Additional attributes  
Additional identifiers

## Profile management

Identify

Collaboration



**Unified people  
& account profiles**

AI/ML

Segmentation

## Activation

### Marketing ecosystem

Paid media e.g. Google  
Social media e.g. Facebook  
Partner systems

### Personalization

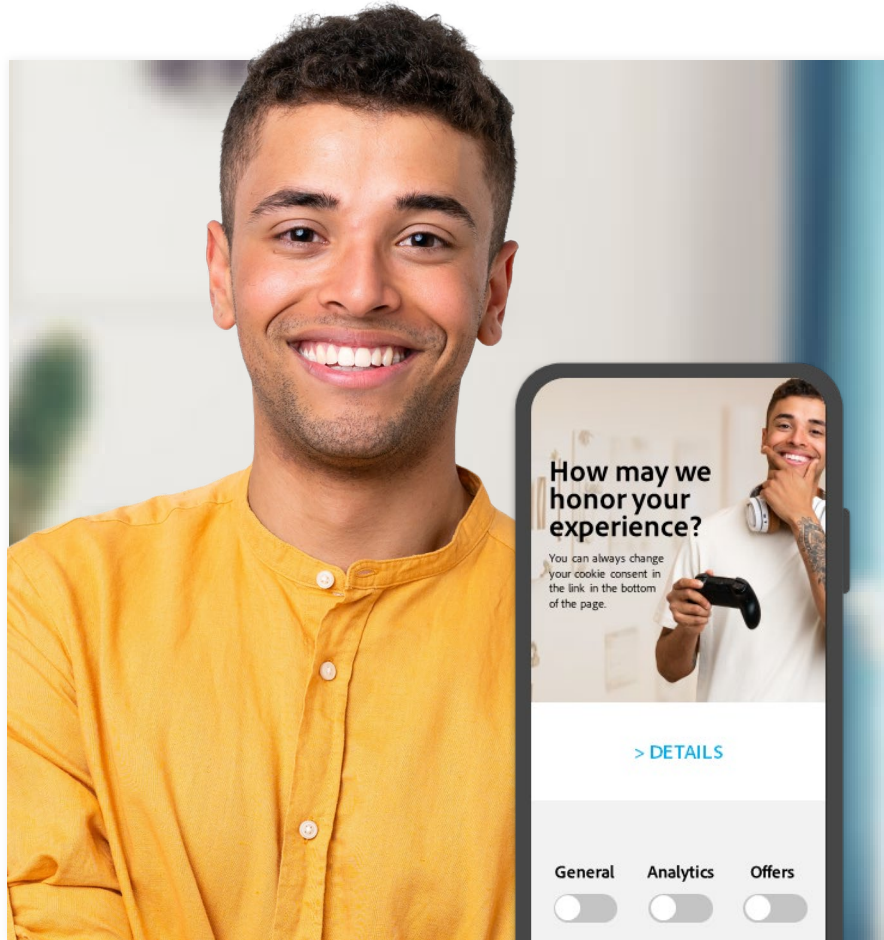
On-site Personalization  
In-app Personalization

### Custom systems

CRM      Partners  
Email      Data lake  
SFTP/S3      Open APIs

**Consent & patented data governance**

# Actionable Customer Profiles for Complete Customer Data Management



## Person attribute data

### Who are they?

- Name
- Device ID
- Phone number
- Account association
- Loyalty status
- Email address



## Behavioral data

### What do they do?

- Search Ad click
- Call center interaction
- Download whitepaper
- Website visit
- Opened email offer
- In store activity



## Preferences

### How do you build trust with them?

- Consent by use case
- Opt-in programs and offers
- Data sharing transparency
- Communication frequency



## Audience

### Which segment do they qualify for based on what they do?

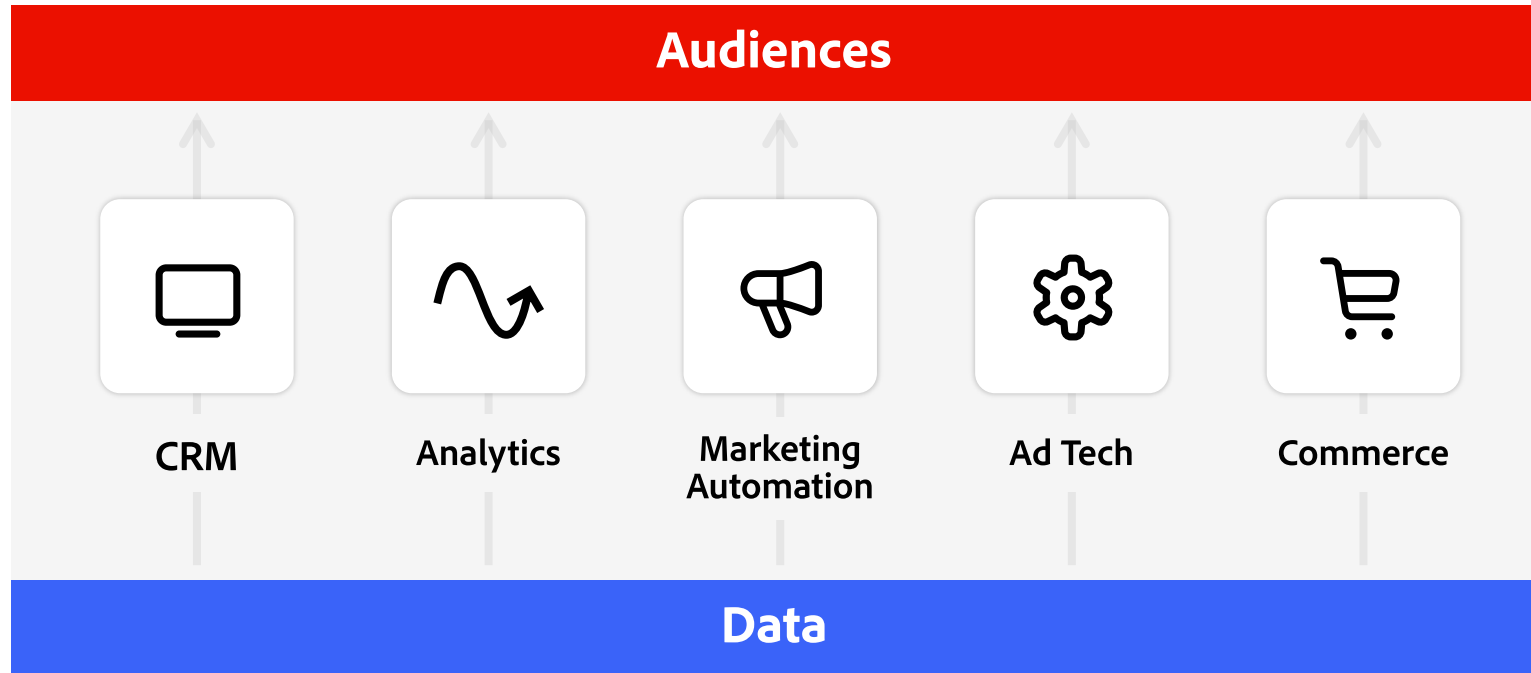
- Eligible for upgrades
- Propensity for churn
- Cross channel shoppers
- B2C and B2B customer
- New product prospects
- Suppression audience

# Introducing Federated Audience Composition





# A sea of data

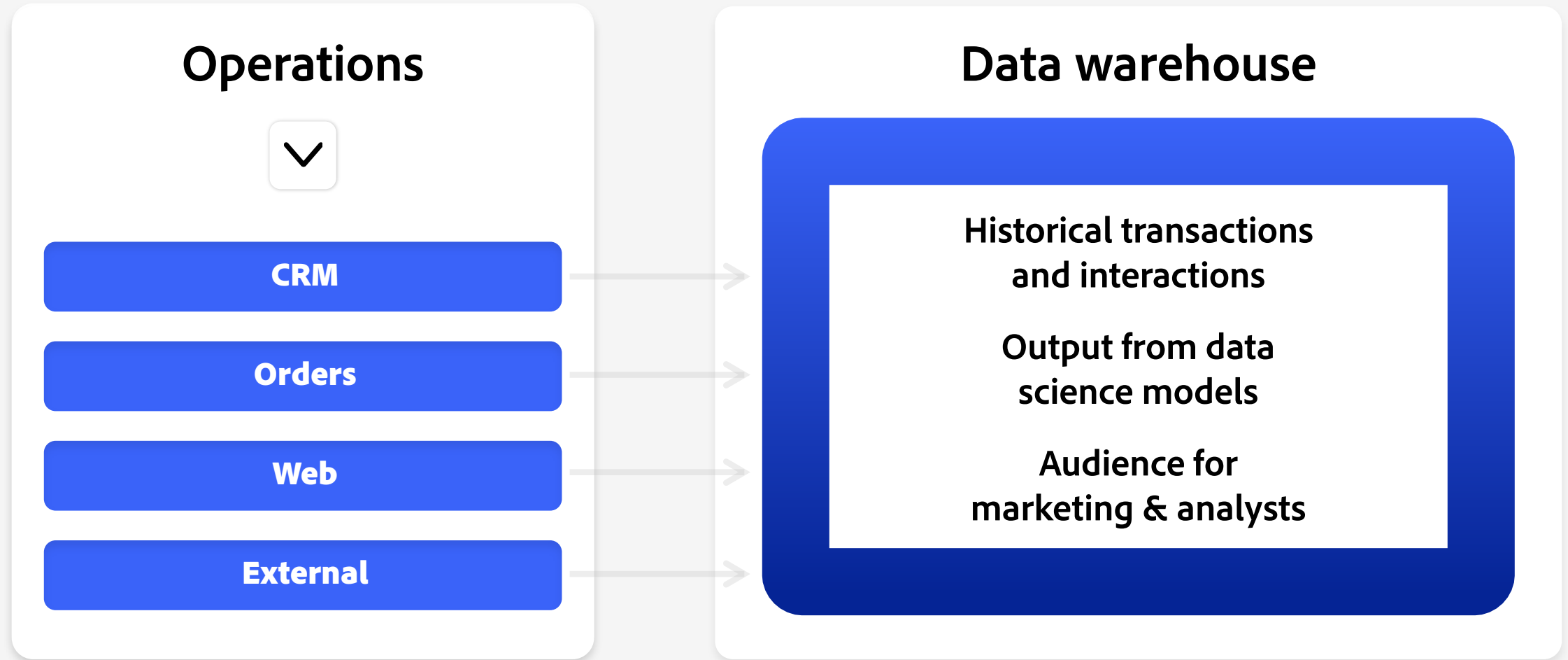


- No source of truth
- Data redundancy & duplication
- Disjointed view of customer
- Lack of cohesive governance framework

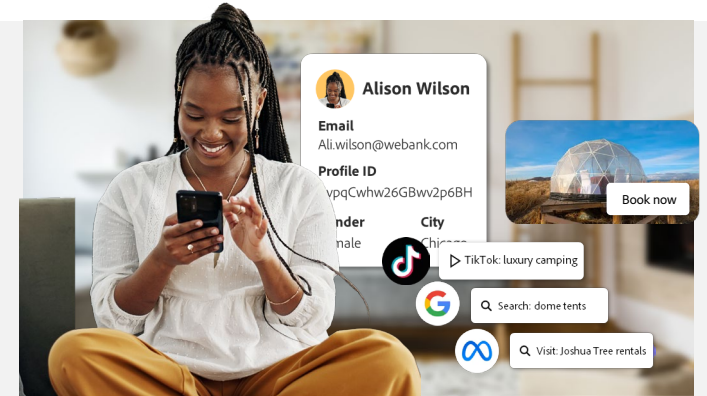
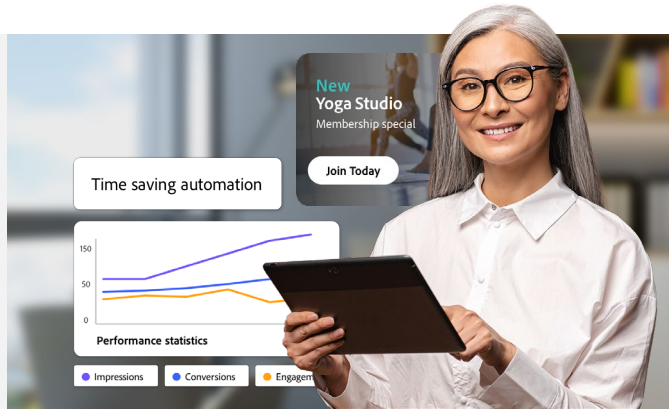
**All leading to disconnected customer experiences.**



# Increased adoption of warehousing for digital experience use cases



# Data consolidation for Marketing: CDP Investments



## Ingest

- Known data – CRM
- Pseudonymous – behavioral
- 2nd party data
- 3rd party data
- Warehouse data

## Process and rationalize

- Profiles
- Identity resolution
- Audiences
- Governance

## Activate

- Advertising
- Marketing
- Services
- Sales



# Evolve from Brand Initiated to In-the-moment engagements

Send to all profiles

20% off winter breaks



Shift from reactive to proactive and **predicative engagement.**

Optimized, contextual experiences **based on customer preferences.**

**Connected experience** across the customer journey.



Lucy Fox

Email

Lucy.fox@webank.com

Profile ID

BvpqCwhw26GBwv2p6BH

Gender

Female

City

New York

Winter sun  
in Barcelona

Learn more

Search: Winter sun, city breaks

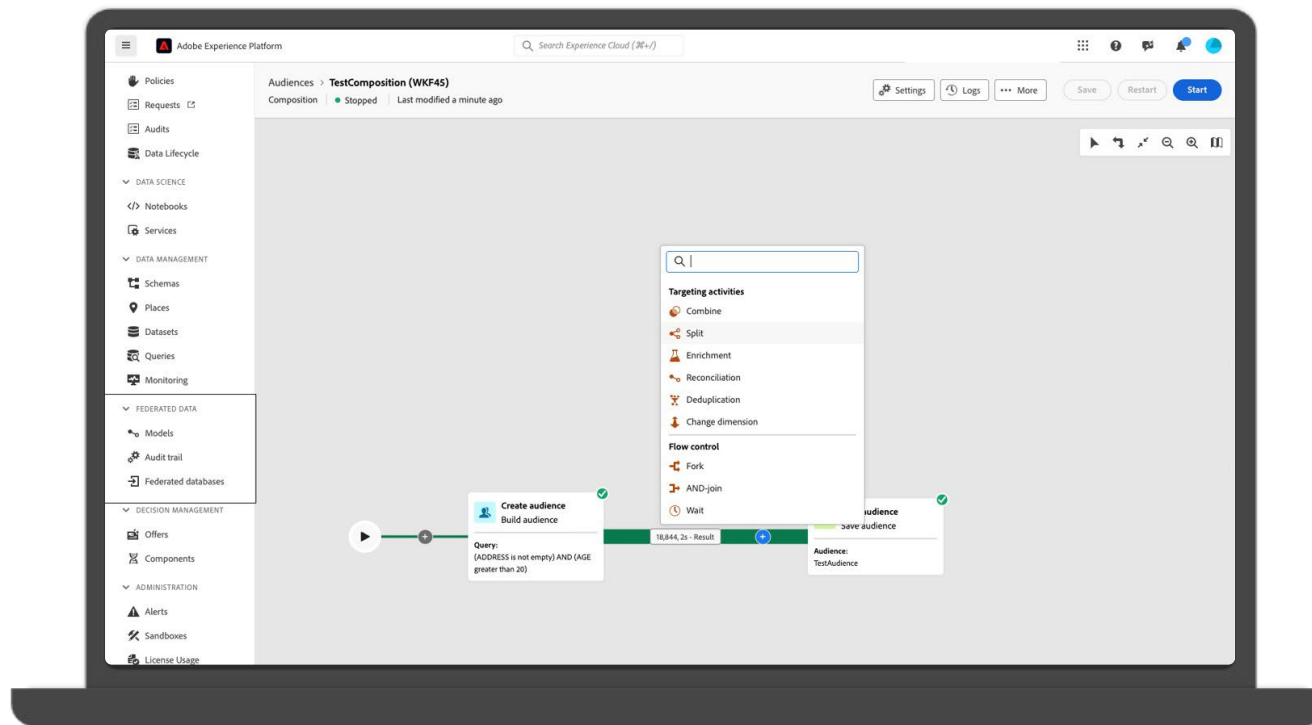
Send to Lucy Fox

20% off winter breaks in Barcelona



# Adobe Experience Platform Federated Audience Composition

Provides new pathways and expanded access to create audiences from enterprise data warehouses to power brand-initiated and in-the-moment experiences



- **Access critical enterprise datasets**

Get federated access to enterprise data warehouses to create audiences for engagement use cases and use a visual UI to access enterprise datasets.

- **Compose audiences**

Build audiences using critical datasets that reside in enterprise warehouse systems without moving the underlying data.

- **Enrich existing audiences**

Refine audiences in Adobe Experience Platform using composed audiences from enterprise datasets to improve segmentation, targeting, and personalization.

- **Activate audiences across channels**

In combination with Real-Time CDP and Journey Optimizer, drive consistent and personalized experiences across channels using prebuilt destinations.



# Address technical needs and customer experience use case requirements

Provide data engineering teams with **flexibility...**

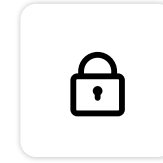
...while meeting marketing **requirements at scale**



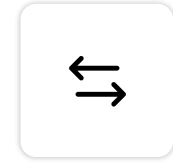
Leverage data warehouse investment to power marketing use cases



Utilize only the data that is needed to meet low-latency use case requirements



Address privacy and security needs by keeping sensitive data in enterprise systems



Go beyond reverse ETL and coordinate data in a single system for multi-channel activation



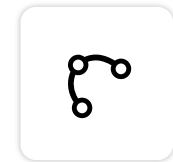
Create and enrich audiences and profiles\* with critical and actionable enterprise data for effective personalization



Utilize a marketer friendly UI to access relevant audience data needed for marketing activities



Immediate availability of essential audience data for cross-channel, in-the-moment experiences



Access and consolidate marketing audiences in a single system for consistent and streamlined activation

\*Profile Enrichment use cases with Federated Audience Composition is a roadmap item

# A comprehensive approach to audience curation and activation

Federated Audience Composition with Real-Time CDP and/or Journey Optimizer Value Proposition

1

**Expand access to critical warehouse-based datasets to create high-value audiences**

Utilize existing data warehouses as the main system of record, while leveraging best-in-class applications to power great customer experiences.

2

**Comprehensive support to power engagement use cases**

Federated Audience Composition, paired with Real-Time CDP or Journey Optimizer supports brand-initiated, personalized experiences with federated audiences and delivers in-the-moment experiences triggered by real-time events, combined with person attributes to meet use case requirements across teams.

3

**Minimize data movement and duplication**

Create audiences from datasets that live in an enterprise data warehouse without copying underlying data to manage actionable marketing profiles and audiences.

4

**Utilize a single system for experience-driven workflows**

Curate ingested and federated audiences in Adobe Experience Platform and coordinate outbound experiences across all channels.



Warehouse

Database type

**Altura database**



All customers with \$500+ in purchases over the past 5 years



**Setup and audience**

Selected audience

**1**

Selected attributes

**4**

Federated database access

**5 year high value customers**

## HELPFUL RESOURCES

# Federated Audience Composition Guide

## 2024 Forrester Wave

### Flexibly access enterprise data with Federated Audience Composition

A Guide

Adobe

FORRESTER

WAVE REPORT

### The Forrester Wave™: Customer Data Platforms For B2C, Q3 2024

The 12 Providers That Matter Most And How They  
Stack Up

September 17, 2024 • 17 min read



Joe Stanhope  
VP, Principal Analyst



With contributors:  
Emily Collins, Elwin Evans,  
and Christine Turley

#### Summary

In our 29-criterion evaluation of customer data platforms for B2C providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps B2C marketing professionals select the right one for their needs.

**Adobe**